



**U.S. Department of Energy  
Office of the Chief Financial Officer  
Office of Corporate Financial Systems**

**Business Management Information System  
- Financial Management Project**

# **Project Communication Plan**

**Submitted by:**

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## **1. INTRODUCTION AND BACKGROUND**

The Business Management Information System - Financial Management (BMIS-FM) Project is an initiative to acquire and use an off-the-shelf system for performing the Department's budget execution and funds control, accounts payable, accounts receivable, cost accumulation and distribution, general accounting, project accounting, asset accounting, and financial reporting. It is a senior management sponsored Project being conducted under the umbrella of the DOE Corporate Management Information Plan, and being carried out through a partnership of both headquarters and field staff. This Plan establishes the strategy for communications between the BMIS-FM Project Team and its stakeholders for the duration of the project.

The new system will operate on the existing DOE information architecture, and will meet all relevant information technology standards and security requirements. The system will also be configured to ensure data integrity and will have sufficient redundancy in its design to minimize down time and data risks. Additionally, the new system will be based on standards that will allow expansion as new functionality is added to the software.

The BMIS-FM system will offer significant benefits over current systems. The key benefit will be a significant improvement in the Department's ability to fulfill its fiduciary responsibilities for appropriated funds. Other benefits range from operational cost savings to non-quantifiable benefits such as better support for planning and performance measurement activities, easier and more widespread access to financial management information, and significant improved response time for management and external queries. The new system will also help the Department meet Federal agency performance management reporting requirements. Specifically, the BMIS-FM system is expected to:

- facilitate uniform and consistent financial management policy and processes
- increase organizational integration
- increase productivity and performance
- reduce costs and redundancies in processing, systems and services
- improve the overall quality, efficiency and effectiveness of management.

To facilitate implementation and maintenance of the new system, the BMIS-FM Steering Committee has agreed in principle that, when necessary, existing business practices will be modified to work with the existing capabilities of the software to minimize customization of the software code. The BMIS-FM Project will change the way the Department (and to some degree, its contractors) conduct business. Therefore, effective two way communication between the Project Team and stakeholders during the life of the Project is critical to managing the transitions associated with the new financial system. The BMIS-FM Project may result in changes to:

- business rules
- reporting relationships
- accounting and budgeting processes
- business processes and work flows

- the alignment of financial management responsibilities
- information systems (use of web, application service providers)
- financial management controls
- performance accountability.

Effective Project communication is critical to the success of the initiative, and this Plan establishes the foundation for ensuring stakeholder awareness, understanding and involvement.

## **2. PURPOSES AND GOALS OF BMIS-FM COMMUNICATIONS**

The primary purpose of the Project communications strategy is to facilitate a smooth transition to the new system by informing stakeholders of the changes that will occur as a result of the new system, and by communicating Project status to stakeholders on a regular basis.

A second purpose of Project communications is to provide opportunities for stakeholder input and feedback on key Project issues, and by encouraging broad-based participation on BMIS-FM teams and work groups. This purpose will also be served by establishing strong feedback loops and ensuring all feedback received is considered, acted upon, and answered.

A final purpose of BMIS-FM Project communications is to publicize Project plans, system features, and test results to address the anxiety that normally occurs when making changes of the magnitude planned for this Project. Extensive training directed at expanding user's knowledge and understanding of the new system will also be used to fulfill this purpose.

The goal for BMIS-FM communications is cost-efficient, timely delivery of useful Project information to all stakeholders.

## **3. BMIS-FM COMMUNICATION PRINCIPLES**

The following major principles will guide communications during the Project:

- Succinct and informative communication with all internal and external stakeholders will be maintained throughout the full Project life cycle.
- Project communications will use existing DOE methods and delivery channels, and the Project will establish new channels as appropriate.
- Opportunities will be maximized for stakeholder input, feedback, and communications with Project officials.
- Repetition will reinforce the messages and help ensure a shared understanding.
- The communications strategy will be integrated and coordinated across all methods and

channels.

- Project communications will be tailored to meet the needs of stakeholder groups.
- Exchange of views among stakeholders will be encouraged and fostered.
- Project communications will help each employee answer the question “How will BMIS-FM impact me and my daily work?”
- Project communications will be timely and cost-effective.

#### **4. TARGET AUDIENCE for BMIS-FM COMMUNICATIONS**

The target audience for BMIS-FM Project communications is broad and diverse, and can be categorized into six general groups:

##### External Sponsors

Congress  
Treasury  
OMB

##### Internal IT Sponsors

Executive Committee on Information Management  
Information Management Systems Council  
Information Technology Council

##### External Customers & Suppliers

Work for Others Sponsors  
Vendors to the DOE  
DOE Grant Recipients  
DOE Integrated Contractors  
Auditors and External Reviewers

##### Core System Users

BMIS-FM Project Participants  
Users of DISCAS, MARS, FDS, EIS and FDW  
BMIS-FM Information Technology Support Staff  
Owners of Systems with BMIS-FM Interfaces

##### Senior Financial Officials

Chief Financial Officer  
Field Chief Financial Officers  
HQ CFO Office Directors  
Budget and Finance Directors

##### Information Consumers

DOE Managers and Program Budget Staff  
DOE Financial Professionals  
Employee Unions  
All other DOE Employees

#### **5. COMMUNICATION FREQUENCY & CONTENT**

The frequency and content of BMIS-FM Project communications will be tailored to meet the needs of the target groups, and will vary depending upon the Project phase.

- External Sponsors such as Congressional staff, the OMB Examiner, and Treasury officials will be provided cost and schedule status updates on a quarterly basis over the life of the Project.
- Internal Sponsors such as the ECIM, IMSC, IT Council, and CIO will receive cost, schedule, and technical status information at least once per month over the life of the Project.

- Key External Customers and Suppliers whose interactions with the Department will be impacted by the new system will receive communications about Project plans and status at least quarterly throughout the Project. As the Project enters the implementation phase and potential changes to these customers are better understood, the frequency of communications will increase and will be used to provide specific information on the impacts of the new system to their interactions with the Department.
- Core System Users will be able to access the BMIS-FM Steering Committee meeting minutes at the Project web site. Additionally, key Project documents will be published on the web site as they are developed. The Core System Users will also receive quarterly communications on Project status and plans throughout the life of the Project.
- Senior Financial Managers will receive status updates during monthly Field CFO conference calls, status briefings at the quarterly Field CFO meetings, and at a briefing annually at the CFO Conference. Additionally, Senior Financial Managers will be provided the opportunity for involvement in all key Project decisions affecting their responsibilities, workloads, and alignment.
- Information Consumers will receive quarterly status communications during the life of the Project. As the Project enters the implementation phase and the system features, query, and reporting tools of the new system are better understood, the frequency of communications will increase and will be used to provide specific information on these system attributes.

## 6. COMMUNICATION ROLES & RESPONSIBILITIES

Each level of the management structure adopted for the BMIS-FM Project has a vital role in carrying out this Plan.

<b>Project Management Structure Element</b>	<b>Communications Responsibility</b>
Executive Committee on Information Management (ECIM)	<ul style="list-style-type: none"> <li>• Communicate Project status and funding requirements to senior management</li> </ul>
BMIS-FM Board of Directors <ul style="list-style-type: none"> <li>• Chief Financial Officer</li> <li>• Deputy Chief Financial Officer</li> <li>• Chief Information Officer</li> </ul>	<ul style="list-style-type: none"> <li>• Communicate Project status and funding requirements to the ECIM</li> <li>• Solicit support of the Department's executives and managers on the necessary cultural changes required to successfully implement BMIS-FM</li> </ul>
BMIS-FM Steering Committee	<ul style="list-style-type: none"> <li>• Use both formal and informal channels to communicate Project status information to the individual's sponsoring organization</li> </ul>

<b>Project Management Structure Element</b>	<b>Communications Responsibility</b>
Project Manager	<ul style="list-style-type: none"> <li>• Present Project briefings to the Board of Directors, Steering Committee, Employee Unions, and other interested parties</li> <li>• Originate specific Project communications</li> </ul>
Communications Lead	<ul style="list-style-type: none"> <li>• Prepare and provide briefings, announcements, newsletters, web site content, etc.</li> <li>• Maintain continuous communication with the Project Manager and site champions</li> <li>• Receive feedback from site champions, employees, and others, and brief the Steering Committee and Project Manager</li> </ul>
BMIS-FM Site Champions	<ul style="list-style-type: none"> <li>• Serve as liaison between site stakeholders and the Project Team</li> <li>• Communicate Project status to site stakeholders</li> <li>• Primary point of contact for data needed from and/or by a site</li> </ul>
BMIS-FM Web Site Page Master	<ul style="list-style-type: none"> <li>• Maintain the BMIS-FM web site</li> <li>• Issue special web site access authorizations</li> <li>• Provide feedback received through the web site to the Communications Lead and Project Manager for disposition</li> </ul>

The importance of the Project's management structure in executing this Plan cannot be overemphasized. It is incumbent on the Board of Directors, members of the Steering Committee, and Project staff to establish both formal and informal channels for communicating Project status information. Each member needs to remain personally involved in the Project, helping to build commitment to the vision and ensuring his or her behavior remains congruent with the vision. Communications must be realistic, timely, and informative, but also optimistic. Information about the performance and ease of use benefits will also be publicized. Information about short-term disruptions or turbulence during transition periods and any corrective actions underway will also be communicated.

## **7. DELIVERY METHODS**

The BMIS-FM Project has access to a wide variety of existing Departmental delivery methods. The actual method used will vary depending on the project phase, the target group(s), and content to be delivered. It is anticipated that during the life of the Project, communications will be delivered using DOECAST messages, web casting, the BMIS-FM web site, presentations at Federal and contractor conferences and meetings, newsletters, memoranda, announcements, and any other appropriate delivery method. No media plan for the general public is anticipated, but we will work with the Office of Public Affairs on at least two news releases for the Federal CFO and IT communities.

For External Sponsors, we will use formal mechanisms such as the official budget submission and related testimony and briefings. We will also use the annual Corporate Management Information Plan to report to Congress on Project status and costs.

For Internal Sponsors, we will use periodic Project status briefings as well as the formal mechanisms used for External Sponsors.

Communications with Customers and Suppliers will be through formal written documents when directive or instructional in nature (e.g., when establishing new interface requirements) or through formal briefings when the content is primarily informational. The DOE integrated contractors are a critical component of this category, and the Project will rely heavily on the Financial Management Systems Improvement Council representative to the BMIS-FM Steering Committee, the FMSIC web site, and the FMSIC Clearinghouse to communicate with the contractors.

For Core System Users, a majority of the communications will be provided through the BMIS-FM web site. Core system users will be encouraged to access the web site to obtain Project status information and to review key project documents. Core System Users who are Project participants will also receive information through their interaction with BMIS-FM Team Leaders and other Project participants.

Senior Financial Managers will primarily receive their Project information through Field CFO conference calls and formal briefings at meetings and conferences. When a key Project decision would impact their responsibilities, workload or alignment, a special meeting of Senior Financial Managers may be convened to obtain their input on the decision.

Communications with Information Consumers will be through existing channels such as the CIO and CFO newsletters, and through members of the Steering Committee. Information Consumers will also be encouraged to use the Project web site to pull down information.

## **ATTACHMENT A: BMIS-FM COMMUNICATIONS SCHEDULE**

The schedule presented below is not static, and as new communication opportunities develop, the Project will exploit them. The schedule will be reviewed and updated on a quarterly basis.

### **Recurring Communications:**

<b>Event</b>	<b>Method</b>	<b>Minimum Frequency</b>	<b>Representative Content</b>
Annual CFO Conferences	<ul style="list-style-type: none"><li>• Briefing</li></ul>	Annual	Project Plan and Status
Board of Director Meetings	<ul style="list-style-type: none"><li>• Briefing</li></ul>	Quarterly	Project Cost, Schedule, and Technical Status
Budget Results Council Meetings	<ul style="list-style-type: none"><li>• Briefing</li></ul>	As Conducted	Project Plan and Status
CFO Conference Calls/Meetings	<ul style="list-style-type: none"><li>• Briefing</li></ul>	Quarterly	Project Status
CFO Newsletter	<ul style="list-style-type: none"><li>• Article</li></ul>	As Issued	Project Plan and Status
CFO Staff Meetings	<ul style="list-style-type: none"><li>• Briefing</li></ul>	Weekly	Project Status
DISCAS User's Meeting	<ul style="list-style-type: none"><li>• Briefing</li></ul>	Annually	Project Plan and Status
ECIM Meetings	<ul style="list-style-type: none"><li>• Briefing</li></ul>	Quarterly	Project Status
FMSIC Meetings	<ul style="list-style-type: none"><li>• Briefing</li></ul>	As Conducted	Project Status
Steering Committee Meetings	<ul style="list-style-type: none"><li>• Minutes</li></ul>	As Conducted	Project Issues and Decisions
Union Meetings	<ul style="list-style-type: none"><li>• Briefing</li></ul>	Quarterly	Project Status

### **Event-Driven Communications:**

<b>Event</b>	<b>Method</b>	<b>Representative Content</b>
Contract Award	<ul style="list-style-type: none"><li>• Press release to Federal IT and CFO community</li><li>• DOECAST Federal</li><li>• Web Site Update</li><li>• Memo to FMSIC</li></ul>	Name vendor, contract terms, scope summary, CFO quote
Final Implementation Plan	<ul style="list-style-type: none"><li>• CFO Newsletter article</li><li>• Site Briefings (road show)</li><li>• FMSIC briefing</li><li>• Publish on Web Site</li><li>• Memo to Heads of Offices, Contractors, and Unions</li></ul>	Plan overview, phase scope summaries, critical milestones
SGL Conversion Plan	<ul style="list-style-type: none"><li>• CFO Newsletter article</li><li>• Site Champion briefings</li><li>• Committee minutes</li><li>• DISCAS notes</li><li>• Memo to contractors</li></ul>	SGL Pilot Implementation, SGL Implementation Strategy



<b>Event</b>	<b>Method</b>	<b>Representative Content</b>
SGL Conversion	<ul style="list-style-type: none"> <li>• CFO Newsletter</li> <li>• Site Champion briefings</li> <li>• Steering Committee minutes</li> <li>• Memo to contractors</li> </ul>	Cite Accomplishment Explain changes
Start of Acceptance Testing	<ul style="list-style-type: none"> <li>• CFO Newsletter article</li> <li>• CFO Conference Call</li> <li>• Steering Committee Minutes</li> <li>• Web Site Update</li> </ul>	Schedule, scope and people involved in testing
Start of Training	<ul style="list-style-type: none"> <li>• CFO Newsletter article</li> <li>• CFO Conference Call</li> <li>• Steering Committee Minutes</li> <li>• Web Site Update</li> <li>• Memo to Unions</li> <li>• Memo to trainees</li> </ul>	Schedule, scope, and people involved in training
Start of Implementation	<ul style="list-style-type: none"> <li>• CFO Newsletter article</li> <li>• Site Briefings (road show)</li> <li>• FMSIC briefing</li> <li>• Publish on Web Site</li> <li>• Memo to Heads of Offices</li> </ul>	Implementation schedule, scope, and resource expectations
Major Milestone Completion	<ul style="list-style-type: none"> <li>• CFO Newsletter article</li> <li>• Site Briefings (road show)</li> <li>• FMSIC briefing</li> <li>• Publish on Web Site</li> <li>• Memo to Heads of Offices, Contractors, and Unions</li> </ul>	Description of Accomplishment
Implementation Completion	<ul style="list-style-type: none"> <li>• Press release to Federal IT and CFO community</li> <li>• DOECAST Federal</li> <li>• Web Site Update</li> <li>• Memo to FMSIC</li> </ul>	Project duration, scope, cost, and lessons learned